



## APPLICATION FOR RECORDS RETENTION SCHEDULE

OFFICE OF THE SECRETARY OF STATE  
DEPARTMENT OF ARCHIVES AND HISTORY  
RECORDS MANAGEMENT DIVISION

**INSTRUCTIONS:** See Publication No. 76-RM-1 for instructions on completing this form. Forward signed original to Department of Archives and History, Records Management Division, 330 Capitol Avenue, Atlanta, Georgia, 30334, Attention: Scheduling Section.

FOR AGENCY USE		FOR RECORDS MANAGEMENT USE	
Application Date	1. Agency Address Department of Education Office of Administrative Services Regional Education Services Division Atlanta, GA 30334	Application Number <b>81-262-A</b>	
Application Number		Date Received <b>MAY 26 1981</b>	Date Completed <b>JUN 8 1981</b>
2. Person to Contact Marsha Chambers		Working Title Senior Secretary	Telephone Number 656-2446
3. Action Requested a. <input type="checkbox"/> Establish Retention Schedule; record will continue to accumulate. b. <input type="checkbox"/> Dispose of present accumulation; no further accumulation anticipated. c. <input checked="" type="checkbox"/> Amend Application No. <u>81-262</u> Check One: <input checked="" type="checkbox"/> Change; <input type="checkbox"/> Supersede; <input type="checkbox"/> Void			
4. Dates of Series Earliest      Latest 1969      to date		5. Records Series Title (followed by title used in office, if different) Bond Depreciation and Joint Hazard Reserve Applications Files	
6. Division and Office Function      What is the function of the Division and the Office in which this record series is created? The Regional Education Services Division is responsible for providing liaison services between the State Department of Education and the 187 local school systems and 16 CESAs (Cooperative Education Service Agencies). It provides monitoring in administrative areas dealing with State Board of Education policies and State laws; administers state school standards through on-site appraisal of standards applications; assists local school systems in the development of local facility plans; conducts pupil-teacher ratio and attendance audits; provides liaison services to accrediting agencies and principals' organizations; compiles school systems data for directories, school calendars, and the State legislature. These services are provided through the Division Director, 10 Regional Directors (located in offices throughout the state), and 1 Administrator assigned to work with the principals' organization.			
7. Record Series Description      This file contains the following documents (include form numbers and titles, if any): Attach samples of the file.  Documents relating to: coordinating applications by local school systems to use Depreciation and Joint Hazard Reserve funds held for use on buildings when state school bonds are paid off. Included are: certificate of Use (DE Form 0962), Project Breakdown (DE Form 0963), approval letter and related correspondence.          File is arranged: Chronologically by bond series group; thereunder alphabetically by local school system.			
8. Monthly Reference Rate      How often are records referred to which are: One to six months old <u>18</u> ; Seven to twelve months old <u>18</u> ; Thirteen to twenty-four months old <u>18</u> ; twenty-five months and older <u>18</u> ?			
9. Annual Rate of Accumulation of Records Letter-size drawers <u>1/5</u> ; Legal-size drawers _____; Shelves _____; Other (specify) _____			

YES	NO	10. Questionnaire (Place an "X" in the proper column)
X		a. Is this the official copy of the series? If not, where is it?
	X	b. Does the series contain confidential information requiring security handling? If yes, cite law or regulation.
	X	c. Is this a vital record?
X		d. Does this series have historical or long term research value?
	NA	e. When one or two documents in the file make it necessary to keep the entire file for a long period, could these documents be scheduled separately?
	X	f. Is the information contained in this series ever published? If yes, attach copy.
	X	g. Is the information contained in this series ever analyzed and/or recorded in a summarized report? If yes, attach copy.
	X	h. Is there a duplication of this series in your office, or in another office or agency? If yes, where? PARTIAL DUPLICATION IN EACH SCHOOL SYSTEM
	X	i. Is this series (or a major portion of it) regularly microfilmed?
	X	j. Does the record series result in a computer printout?

#### 11. Retention Requirements

The following requires the series to be kept:

- |                          |              |                                   |              |
|--------------------------|--------------|-----------------------------------|--------------|
| a. State Law             | _____ years. | d. Audit period                   | _____ years. |
| b. Statute of limitation | _____ years. | e. Administrative need            | _____ years. |
| c. Federal law           | _____ years. | f. Federal retention instructions | _____ years. |

Attach copy or excerpt of laws or regulations. Explain administrative need.

#### 12. Approved Disposition Instructions

This agency recommends that the file series be cut off at the end of each:

☐ Calendar Year; ☐ Fiscal Year; ☒ Other bond series group then,

- ☐ Hold in the current files area \_\_\_\_\_ month(s) \_\_\_\_\_ year(s); then
- ☐ Transfer to local holding area; hold \_\_\_\_\_ year(s); then
- ☐ Transfer to State Records Center; hold \_\_\_\_\_ year(s); then
- ☐ Destroy.
- ☐ Transfer to State Archives for permanent retention.

☒ Other (Specify) Hold in current files area until all funds have been approved for expenditure in all school systems receiving funds; then transfer to State Records Center, hold 25 years, then destroy.

These instructions apply to all prior and future accumulations of the series.

Agency Head/Designee (Signature)	Date	Records Management Officer (Signature)	Date
<i>[Signature]</i>	5/21/81	Walker L. Baumgardner	5/20/81
Recommendations in paragraph 12 are approved. (If disapproved, attach letter of explanation.)		State Records Committee (Signature)	Date
		State Auditor/Designee	6-5-81
		Secretary of State/Designee	6-4-81
		Attorney General/Designee	6-5-81



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<i>[Signature]</i>	4/22/81	Walker L. Baumgardner	4-21-81
Recommendations in paragraph 12 are approved. (If disapproved, attach letter of explanation.)		State Records Committee (Signature)	Date
		State Auditor/Designee	5-1-81
		Secretary of State/Designee	4-28-81
		Attorney General/Designee	5-4-81